

Imprivata OneSign® Upgrade Testing Overview

For customers upgrading to a newer version of Imprivata OneSign, we recommend using the methodology developed by the Imprivata Technical Services Group (ITSG) to ensure success. This methodology includes the following phases:



Below is a step-by-step process for each phase of the methodology:

TEST UPGRADE OF PRODUCTION DATA

In this phase, a database copy of the production database should be made and restored to a test appliance before being run through the appliance upgrade process. Doing this ensures that there will be no data migration issues from the upgrade to the new version. It also provides a mirror of your production environment data to test with, which is highly recommended.

Customers who do not have a test appliance can test their application profiles with the stand-alone agent of the version they are upgrading to. Customers can retrieve a copy of this by logging into the Imprivata Customer Portal and downloading a copy from the Downloads section.

TEST APPLICATION PROFILES AND WORKFLOWS

Once you have created a replica of your production environment with the test appliance, you will want to test application and end-user workflows. It is critical to ensure that you have tested the application profiles before rolling out the agent. With each major version of Imprivata OneSign, the product is enhanced to improve the ability to learn and sign-on to applications. These changes offer a better way to handle a workflow or application, and they may require creating copies of the application to roll out with the new agent. In addition to the application workflows, end-user workflows must be tested thoroughly. Examples of end-user workflow testing would include but are not limited to the following:

- Ensuring that applications are being shut down properly.
- Ensuring extension objects are being executed at the correct times.
- Ensuring that authentication sequences are functioning without issue.

At this point, you should try to freeze all application changes in your production environment in order to ensure that you are testing with the same configuration as the production.

UPGRADE PRODUCTION APPLIANCE PAIR

Once initial testing is complete, production appliances can be upgraded. At this stage, one must consider how much downtime they want to incur. Depending on what version you are upgrading from, the downtime can be anywhere from two to eight hours. To learn more about the options of zero downtime upgrades, please reach out to the ITSG. Once all appliances are upgraded, the agent can be rolled out to an initial group to begin the End-User Testing phase of the upgrade.

END-USER INSTALL AND TESTING

In phase two of the upgrade process, an initial suite of testing should be done with the applications and workflows. While that is an important phase, true end-user testing is critical to the success of

the upgrade—you will want to establish an initial group of users that can test the various workflows within the agent. It is imperative that the initial group of users test all types of applications that they are running in their environment as well as any other end-user workflows such as authentication and application shutdown/startup. Allowing the user group to have a few weeks to thoroughly test the applications is essential to ensuring successful rollout to a larger group because end-users will help you test all workflows within the Imprivata OneSign agent and flush out any remaining issues.

FULL DEPLOYMENT

With the successful end-user testing phase completed, roll out of the new version of Imprivata OneSign to the remaining users within the enterprise is a success.

IMPRIVATA ONESIGN SERVICE OFFERINGS

After delivering hundreds of implementations in numerous and varied environments across all industries, ITSG can ensure the success you require from your Imprivata OneSign implementation. It is important to be realistic when it comes to the amount of resources and time you can dedicate to testing and rolling out a new version of Imprivata OneSign. Proper testing of the applications and workflows with your end-users will ensure that the upgrade goes smoothly.

Imprivata services include:

- Project management for Imprivata tasks and obligations (general project management is the responsibility of the customer)
- Test appliance upgrade to selected version, typically remotely
- Testing after upgrade, and spot verification (sample set) of application profiles to ensure proper behavior
- Production appliance backup of data, if selected
- Zero downtime upgrades
- Post upgrade testing to ensure successful upgrade
- Assistance with rollout planning for updated agents, if selected
- Full testing of all application profiles, or agreed upon number; rather than spot checking profiles. For additional services time, Imprivata will assist with testing all application profiles to be sure they are still operational after the upgrade
- End-user testing assistance and training on new functionality as well as triage of issues discovered
- Production appliance(s) upgrade to selected version, if selected

If you would like to learn more about our professional services please contact your account manager or sales representative.